

The impact of organisational models for non-core business services in the FM industry

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Abstract

With the growing complexity of organisations, it becomes important to investigate the impact of organisational models for the management of non-core support services in the Facility Management (FM) industry. Based on literature review, the research compared and evaluated relevant organisational models and presents the different strategic approaches behind these models. Thorough analysis of the strategic approaches and models led to the development of a comparison table between the organisation models and the alignment variables. Finally, the main advantages and disadvantages of each organisational model are presented, which is the first stage in the process of aligning FM with organisational strategies.

Keywords: Facilities Management, Business Processes, Organisational Models

1. Introduction

In the past, many organisations utilised their internal personnel and resources for providing non-core support services as part of the Facility Management function. The function evolved and at first, there was an integration of construction and maintenance costs, which was called the life cycle approach. Later, buildings and workspaces were considered integral, and building, furniture and equipment became 'housing' and 'workspace design' (Duffy 2000).

Nowadays this trend has changed, and organisations tend to invest only in their core business services. Many innovative organisations (Battistella and Nonino 2012) used the outsourcing approach to deliver out not only many functions of their organisations such as Research and Development (R&D), manufacturing and logistics, but also 'non-core' support processes. The outsourcing and management of critical or non-critical processes to specialized companies is called business process outsourcing (BPO) (Johnson 2006). BPO is viewed by companies as a cost effective way to gain competitive advantage and focus organizational resources on strategic activities (Battistella and De Toni 2011). Many organisations also frequently outsource non-core support services to external providers to obtain specific know-how from these facility management companies. An evolution of Facility Management procurement models can thus be seen from the 1980s to date.

The 1980s saw a transition towards single-source outsourcing beginning with soft FM services (cleaning, catering, food services, etc.), then on to hard FM services (mechanical, electrical, heating, ventilation, plumbing, building control, management fire and life safety systems, etc.).

The 1990s witnessed an additional transition towards service integration, facilitated by FM automation (CAFM) systems, including: property management, contract management, space design and planning, property acquisition, relocation and asset management.

Further FM integration happened when new stakeholders, such as private investors, added another dimension to the facility services realm through Public-Private Partnerships (PPPs) including Public Finance Initiatives (PFIs). Although this engagement started initially in the UK, it is now expanding in other countries globally, with many derivatives of the UK model.

In the early 2000s, many organisations started outsourcing core functions or processes such as payroll, human resources, finance, business process outsourcing (BPO) functions, and waste management to FM companies. Value-driven design entered the equation, and regional and global contracts started to become more common.

As a result of these developments, FM operates in a huge competitive marketplace with many roles or functions such as FM-suppliers, FM-contractors, FM-consultants and in-house FM teams (Kincaid 1994).

FM covers an extremely wide field of activities (Nutt, 1999), and handles the provision of much-varied core and non-core services (Barrett, 1995). It has embraced a broader range of services, more than building operations and maintenance (Aston, 1994; Best et al., 2003). FM encompasses workplace, buildings, support services, property, corporate real estate, and infrastructure and asset management. Today there are a variety of positions from where FM practice is conducted; those that give priority to property management, business support, customer and employee support, or to different combination of these (Nutt 2000).

This paper reviews available literature on the organisational models for non-core process management in FM, and through analysis develops new classifications for FM organisations. It also examines the main advantages and disadvantages of the presented models, with suggestions on alignment with companies' strategies.

2. Classification of FM organisations

The pioneers of the idea of classifying FM organisations were Davis Gerard and Becker Franklin. In their study, they used classifications to identify the most appropriate FM strategies for different organisational types (Davis et al., 1985; Becker, 1990).

Davis et al. (1985) classified 18 context organisations according to the nature of change (low change/high change) and the nature of work (routine/non-routine). To them, FM operates differently in different contexts because of the attempt to fit into the organisational culture. Similarly Becker (1990) advocated that FM can be categorised according to the context of the organisation, and his typology is based on FM's response to its context.

Then and Akhlaghi (1992) classified facilities management functions into three distinctive groups: strategic FM, tactical FM, and operational FM (table 1). The balance between technical, managerial, and business acumen is required in the strategic, tactical and operational decision making processes. The research also noted that every item of the FM tasks represent a category of decisions that have to be made at various management levels; requiring relevant skills and knowledge to make and implement them, or to access their effectiveness and performance. Table 1 below presents the typical executive responsibilities, management roles and project tasks associated with the three distinct levels of FM as classified by Then and Akhlaghi (1992).

Tab. 1: Classification of FM tasks (Source: Then and Akhlaghi, 1992)

Level	Executive responsibilities	Management roles	Project tasks
Strategic	<ul style="list-style-type: none"> • Mission Statement • Business Plan 	<ul style="list-style-type: none"> • Investment Appraisal • Real Estate Decisions • Premises Strategy • Facility Master Planning • IT Strategy 	<ul style="list-style-type: none"> • Strategic Studies • Estate Utilisation • Corporate Standards • FM Operational Structure • Corporate Brief
Tactical	<ul style="list-style-type: none"> • Corporate Structure • Procurement Policy 	<ul style="list-style-type: none"> • Setting Standards • Planning Change • Resource Management • Budget Management • Database Control 	<ul style="list-style-type: none"> • Guide-line Documents • Project Programme • FM Job Description • Prototypical Budgets • Database Structure
Operational	<ul style="list-style-type: none"> • Service Delivery • Quality Control 	<ul style="list-style-type: none"> • Managing Shared Facilities • Building Operations • Implementation • Audits • Emergencies 	<ul style="list-style-type: none"> • Maintenance Procurement • Refurbishment/ Fit-out • Inventories • Post-occupancy Audits • Furniture Procurement

Thompson (1990) supported this approach with an analogy using computer language. ‘Software’ represents the strategic level of facilities planning and general/office services. The operational level is described as the ‘hardware,’ including, for example, real estate, building construction and building operations and maintenance. The correct choice of ‘software’ enables ‘hardware’ to function. That is, the right management plan enables the best facilities implementation.

Barrett and Owen (1992) presented a different approach dividing FM into two broad categories by function analysis: management and operational, as presented in figure 1.



Fig. 1: How FM is carried out (Source: CEM, 1992)

Similar to Then and Akhlaghi’s (1992) classification, management functions can be distinguished at strategic and tactical levels. At the strategic level there is consultation and non-routine planning aimed at making the best, long-term use of the organisation’s physical resources and overall facilities.

Tactics are action plans involving routine, specific and short-term preventive or managerial operations. Operational level is the implementation of the works performed by different contractors.

Categorising FM activities in strategic, tactical and operational levels links with Kincaid (1994)’s three main strands of integrated activity:

- Property management: strategic activities;
- Office administration: tactical activities;
- Property operations and maintenance activities: operational functions.

Kincaid (1994) identified three distinctive characteristics of FM as follows:

- Facility management takes a support role within an organisation, or provides a support service to the organisation;
- FM must link strategically, tactically and operationally to other support activities and primary activities in order to create value;
- The managers must be reasonably knowledgeable in terms of facilities and management.

Alexander (1996) argued that the strategic FM role is in identifying business needs and requirements. It involves formulating and communicating a facilities policy, in order to ensure a continuous improvement of service quality. The scope of FM strategy is negotiating service level agreements (SLAs), establishing effective procurement and contract strategies, and creating service partnerships.

He suggested that whilst the strategic FM role is quite distinct, the tactical FM functions are basically emphasized through the organization and administration procedures. It involves monitoring, controlling and managing the operational FM, in order to ensure that the operations are well performed in accordance with the organization's requirements or standards; as well as implementing the policy, strategy and plan. The scope of operational FM covers all types of daily and routine services in the workplace. It is also concerned with the effectiveness of the service functionality in an organization.

Johnson & Scholes (2002) viewed management strategy as dealing with the complexities of ambiguous, non-routine situations, which can affect the direction and future of the whole organisation. Strategic decisions demand an integrated approach since the entire organisation should move in unison, in the same development direction. Tactical and operational levels depend on policy direction from strategic planners. The field of tasks envisioned by strategists appeared sophisticated and complex, because many processes and people were involved and many aspects of the organisation must be orchestrated.

Strategy is needed to cope with the prospect of an unknown and changing future since it may generally be said that "the further we look ahead, the more uncertain we become" (Nutt, 2002-03). Although long term forecasting can only hypothesise about the future, strategic planning aims to reduce uncertainty by choosing a preferred path and a reasonable long term direction for the development of the organisation (Nutt, 2002).

Strategic overviews have two objectives (Nutt, 2002-04):

- Negative aims (Reactive): to reduce risk and constraint, and to avoid failure and undesirable outcomes;
- Positive aims (Proactive): to increase opportunities and advantages; to achieve success; to increase value; and to achieve desirable outcomes.

Support activities in facility management can thus provide both short and long-term support, carrying out specific tasks at operational levels, and conceiving projects and plans from policy and strategy, with a view to what lies ahead in the distant future.

Chotipanich (2002) presented different levels of activities and services derived from operations, the foundation of FM practice, and management FM, with the highest level being strategic FM (Fig 2). Service levels begin with simple actions, easily carried out, and develop into sophisticated processes that are more difficult to implement. Assessment, similarly, occurs in small separate bits, leading to a more integrated evaluation of the whole organisation. People at different levels are linked, with a wide range from workers to managers and directors. The higher the service level to be achieved, the more sensitively connected FM must be with every aspect of the organization. This underlines the importance of FM's broadly integrated approach.

		FUNCTION	GOALS	CONCEPTS
FM	Strategic FM	-direct facilities -direct services -direct practise	-income -productivity -sustainability	-strategic -integrative
	Management FM	-implement -control & monitoring -project management	-achievement -satisfaction -performance	-proactive -integrative -planning
	Operational FM	-run facilities -services	-minimum cost -meet needs -quality	-cost-effective -quality assurance

Fig. 2: Characteristics of FM works in different levels (Source: Chotipanich, 2002)

Price (2004) proposed a generic classification system that incorporates the relationships

between the context organisation and its customers. Price (2004) referred to customers not as the employees of a workplace paid by the context organisation and serviced by FM, but the customers of the context organisation.

Kaya and Keith (2005) envisaged the introduction of new Facility Management Organisation (FMO) models, presenting a correlation based on patterns between facility management (FM) and organisation management (OM). He proposed that the characteristics of FMO derived by studies can be categorised into four:

- Occupancy profile;
- Service interaction and visibility;
- Organisational change; and
- Procurement type.

Kaya's FM classification differs in approach by looking at the characteristics instead of the functional levels. Nevertheless no substantial framework is currently available to link or identify strategies with organisation models for the non-core business services.

3. Classification of organisation models

Since the objective of this research is to propose a classification framework for the various organizational models, the method used has involved a literature analysis of the organizational models for FM proposed by prior research and supported by empirical evidence. Williams (1996) and Varcoe (2000) took a procurement and service provider relations perspective in defining and characterising the patterns in FM organisations and the industry.

Williams (1996) models Facilities Management organisations in the following categories:

- Total in-house facilities management
- Outsourcing as "Single" or "Packaged" Contracts
- Total facilities outsourcing: management contract
- Total facilities outsourcing: managing agent

Williams (1996:31) describes managing contracting as *"a system in which the company*

responsible for directing and coordinating the work of task contractors is paid a fixed or sliding scale fee". Although the management agent approach is also fee based, the main difference between management contract and managing agent is that management agent does not enter into the task contracts- these are all direct with the customer.

Varcoe (2000) extended these categorisations and presented some of the future trends. He named the different business proposals as Total Workspace Management, Integrated Service Delivery, Total Infrastructure Provision, and Resource Platform Approach.

In comparison to Varcoe, Williams makes the contractual arrangements as the characterising variable in service provision and shows the relationships patterns between clients and service providers of Facilities Management.

In general, FM service providers can be divided into the following five types:

- Providers of single services
- Providers of multi-services
- Providers of total FM Concepts
- Providers of software solutions
- Providers of consultant services

To the companies who have specialised in being providers of FM services, FM is obviously the core business of the company; irrespective of whether they are providers of single services, multi-services or total FM concepts. Such companies often use the fact that FM is their core business as an important element in their marketing. Organisational models for non-core services can be grouped according to William (1996) as presented in the following sections.

3.1 Organizational model for total in-house FM

In this organizational model type A, all the functional, operational units are able to provide non-core services without the presence of designated facility management personnel or company (Galbraith 2002).

In general, in organisations that utilise own employees for providing non-core services, a

supervisor or coordinator is usually assigned to the facility manager role. This approach (organisation model type B) is typical of small-medium enterprises (SME). The facility manager is a member of the company's management and supervises all the functional units.

In other organisations, research identified a special business unit (organisation model type C) internal to the company, responsible for performing such activities (Barrett 1995). The facility manager has responsibility to manage the whole unit. Examples of organisations that have adopted this organisational model are Rabobank and ING Bank (Krumn 1998). Also the National Park Service (Dept. of Interior 2004) uses a similar business unit for the facility management activities.

3.2 Organizational model for management by an agent strategy

Many organisations without experience or know-how to manage and run non-core FM processes in an efficient and effective way, choose an external FM consultant company to perform FM activities (organisational model type D). This type of organisational model is called the FM managing agent. This strategy envisages the presence of a managing agent (Alexander 1996, Atkin and Brooks 2005) who is employed by the company as a consultant for a medium or long-term period. The main role and responsibility of the FM agent is to monitor or manage the non-core FM services. Examples of consulting firms are Atkins (Atkin 2011), Arup, Interserve, and Morson International (Vagadia 2012).

3.3 Organizational models for direct outsourcing strategy

Nowadays, non-core FM services have become more complex and specialised, and organisations have moved towards outsourcing FM activities in a non-integrated form. Some of the benefits of outsourcing include: a reduction of internal personnel engaged, an increase of internal usage and flexibility to other functional units, and more control over the costs for each non-core service.

Types of outsourcing include: direct outsourcing (Vagadia 2012) in which the facility manager is absent (organisational model E); or is a customer's employee (organisational model type F). In the organisation model E, the customer may turn to three different FM providers.

The Hewlett-Packard Company utilises the organisation model type E in which facility operations are provided by different companies offering a sole typology of services to one or more customers' business units.

The Alcatel Italia Company is representative of the organisational model type F. The company has an internal facility manager, but it outsources the management of records, mail, maintenance and logistics (Pedrali 2007).

3.4 Organizational model for management contract strategy

The single strategy for this organisational model (type G), is the management by a contractor, with the facility manager designated as the contract manager (Atkins and Brooks 2005).

3.5 Organizational models for total facility management strategy

In these organisational models, the non-core support services are provided by a different FM approach, called "total facilities management " or "integrated facility management" (Atkin and Brooks 2005). The term integrated facility management means that the organisation assigns facility management to companies that are capable of providing services in a coordinated, integrated, and autonomous manner (Batistella and De Toni 2011).

Non-core integrated outsourcing providers follow the models H and I proposed in literature (Alexander 1996, Atkin and Brooks 2005, Cotts 1999). The organisational model type H provides an internal facility manager who works for the customer, and is the single point of interface between the customer and the service provider's facility manager. In this model, the service provider's facility manager handles the external relations with the customer and supervises the customer agreements. For the organisational model type H, the service facility manager's role is to report to the company management, and coordinate the non-core services.

The organisational model type I uses an independent outsourced facility manager, who does not work for the non-core service provider nor the customer.

The last three models (G, H and I) are applied by many facility management companies operating in the Middle East such as Johnson Controls, ARUP, and Interserve.

4. Analysis of organizational models

Each of the organisational models (section 3 and fig 3 below) has both advantages and disadvantages, hence the need for alignment of organisational models with FM strategy.

FM MODELS SUMMARY					
Organisation Roles	FM Strategies	No in-house Facilities Manager	In-house Facilities Manager	Consultant (employed by organisation)	FM Service Provider
Internal Workers or Employees	FM Total In House	A	B		
	Management by Agent strategy			D	
Organisation Functional Units	FM Total In House		C		
Service Provider	Direct Outsourcing strategy	E	F		
	Management Contract strategy				G
Total FM Strategy	Total FM Strategy			H	I

Fig. 3 Analysis of FM organisational models from literature

An analysis of the strengths and weaknesses of the organisational models shows the following key points:

Organisation model type A is better used when the non-core services are not too specialised, and interventions are not too frequent. This model's limitations are mostly due to the absence of service coordination.

Organisation models type B and C aim at organising and improving resource coordination by enhancing the efficiency of facility activities. The internal facility manager is a member of the top management of the company, which gives the authority to managing the business units.

The facility management agent has the authority to advice on the activities of each business unit and propose procurement options. As a result, the client organisation has the option to select internal provisioning of the services and outsourcing services.

For the organisational model D, service quality is boosted with the presence of an outsourced consultant, and the company personnel carry out the non-core business services. The main difference between organisational models type B and D is the relation between the facility manager acting as internal employee or as consultant (temporary employee) and the company.

In both the organisational models type D (management by agent) and model type C (in-house management), the facility manager is responsible for the coordination of different business units.

The organisational models type E and F utilise the direct outsourcing strategy with the management of a large number of providers. Here, the customer might employ a facility manager to supervise and coordinate outsourced providers. The facility manager is the single point of interface between the service providers and the company.

For the organisational models types F and G, the managing contractor strategy is applied. The company turns to both non-core service providers and an outsourced facility manager. This approach is used when the company needs to negotiate supply contracts at regular intervals. On the other hand, in outsourcing non-core services for operations and coordination of management services such as the models type F and H, the company has limited control to evaluate the costs.

The total facility management strategy outsources all support for non-core processes/services to large facility management companies. In the organisation model type H, the client organisation retains its expertise and know-how (DeToni et.al 2011). According to Atkin and Brooks (2005), the transaction costs (Williamson 1985) for the organisational model type H are the cheapest amongst all the models due to the lack of sub-contractors.

Then and Tan (2006) in researching the alignment of facilities management performance to business needs provided a model linking FM with the business organisation (fig 4). The need for alignment between the facility management infrastructure and business needs is mandatory for any strategic plan to support organisation success. As can be seen in figure. 4, the concept of FM alignment can be defined with the following four variables:

Variable 1: Supply and Demand alignment

Variable 2: FM service alignment

Variable 3: FM Resource alignment

Variable 4: Organisational alignment

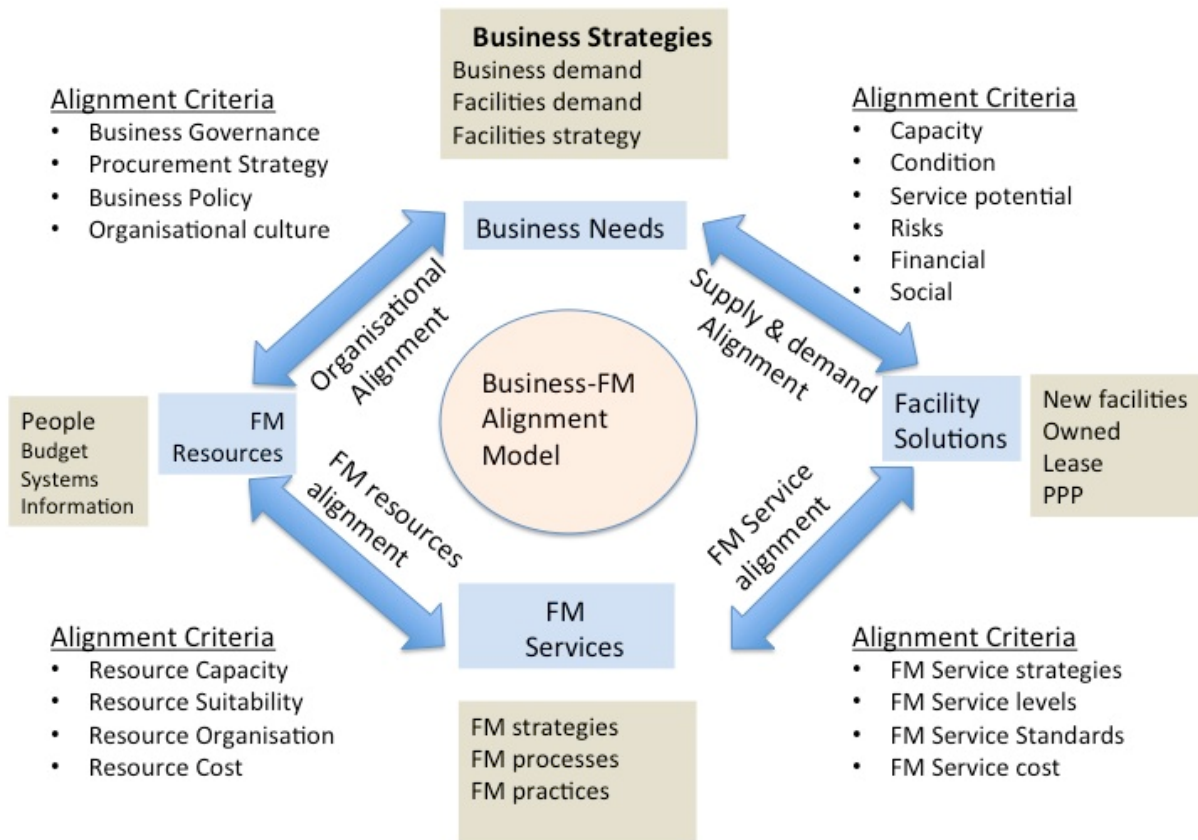


Fig. 4: Alignment FM with Business Needs (Source: Then & Tan (2006))

This can also be seen reflected in earlier work done by Nelson (2008, 2010) on the alignment of the supply and demand chain with the organisation (fig 5) to form a value chain in FM.

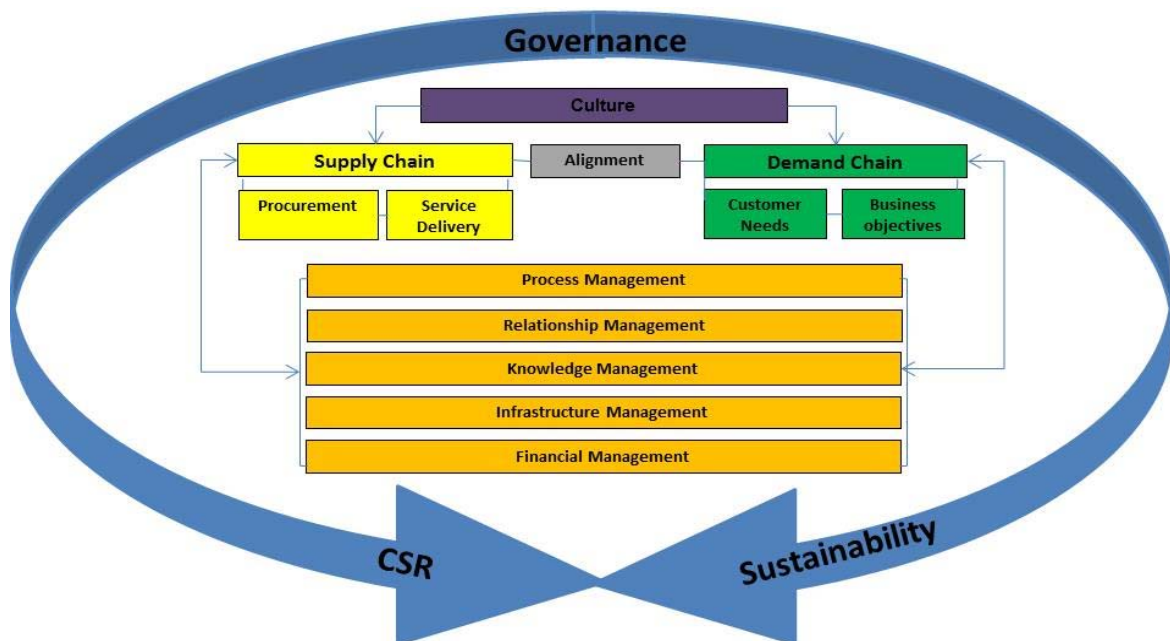


Fig. 5: FM Value Chain (Nelson, 2008, 2010)

In both models, (figs 4 & 5), there is a clear need for the alignment of FM functions, processes, resources and relationships with the organisational objectives and strategy to enhance business performance. Thus, further analysis of the relationships between the organisational models and the alignment variables (table 2) identified that most organisational models utilise the variable supply and demand alignment.

Tab. 2 Relationships between organisation model and alignment variables

Organisation Model	Type model	Alignment Variable
FM Total in house FM	A, B, C	FM Resource alignment
Management by agent strategy	D	Organisational alignment
Direct outsourcing strategy	E, F	Supply & Demand alignment
Management contract strategy	G	Supply & Demand alignment
Total FM strategy	H,I	Supply & Demand alignment

These results place emphasis on the outsourcing models, although it must be stressed that in-house models also require alignment with supply and demand. Further analysis is to be undertaken to examine the validity of these results against identified case studies.

5. Conclusion

The paper presents the classification of the organizational models for non - core service management. It identifies and describes all of the potential organisation models for non - core facility management services using literature review and examples from industry; and presents the advantages and disadvantages under the non-core services perspective.

During this study, it was identified that the selection of the optimal organisation model is contextual, and the selection is based on the following criteria: (a) the complexity of non-core facility services, (b) the internal know-how of the company, and (c) the degree of involvement of the management.

Finally, a relationship table was presented based on the alignment model between FM and business needs, which will be further developed in the research study.

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